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ABSTRACT

Part five of a six volume series of theme papers commissioned for a congress on Catholic schools, this volume includes two papers. In "Catholic School Governance", Rosemary Hocevar reflects on Catholic school governance in order to expand the dialogue on the future of Catholic schools. Hocevar also examines how the Catholic schools have been governed; the relationships that have been established between the schools and the governing authority; and how the schools have been resourced and financed. Future challenges also are addressed by examining: (1) a future creative governance model that can support the mission of the Catholic schools; (2) future relationships that can be developed for the Catholic school community and the governing authority; and (3) future possibilities for the resourcing and financing Catholic schools. The second paper, "Governance" by Lourdes Sheehan examines the historic development of goverance in Catholic schools in order to understand and appreciate the current situation. The financial challenges facing Catholic schools in the future also are examined. (KM)

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NATIONAL CONGRESS

CATHOLIC SCHOOLS
For the 21st Century

THEME:

CATHOLIC SCHOOL GOVERNANCE AND FINANCE

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CATHOLIC SCHOOL GOVERNANCE AND FINANCE

CATHOLIC SCHOOL GOVERNANCE
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GOVERNANCE
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National Catholic Educational Association

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INTRODUCTION

This six volume series contains the theme papers commissioned for the *National Congress on Catholic Schools for the 21st Century*, to be convened on November 6 - 10, 1991.

The National Congress is a jointly planned venture of the three departments of the National Catholic Educational Association (NCEA) directly associated with Catholic schools. With the enthusiastic endorsements of the executive committees and directors of the Department of Elementary Schools, Department of Secondary Schools and the Chief Administrators of Catholic Education (CACE), this unprecedented project is intended to revitalize and renew the climate of opinion and commitment to the future of Catholic schooling in the United States.

The purpose of the Congress can be described in terms of three broad goals. To *communicate* the story of academic and religious effectiveness of Catholic schools to a national audience that includes the whole Catholic community, as well as the broader social and political community. To *celebrate* the success of Catholic schools in the United States and broaden support for the continuation and expansion of Catholic schooling in the future. To *convene* an assembly of key leaders in Catholic schooling as well as appropriate representatives of researchers, business and public officials in order to create strategies for the future of the schools. These strategies address five themes:

The Catholic Identity of Catholic Schools; Leadership of and on Behalf of Catholic Schools; The Catholic School and Society; Catholic School Governance and Finance; and Political Action, Public Policy and Catholic Schools.

The eleven commissioned papers contained in these six volumes represent a common starting point for the discussion at the Congress itself and in the national, regional and local dialogue prior to the Congress.

Since the American bishops published *To Teach As Jesus Did*, their pastoral letter on Catholic education, in 1972, the number of Catholic schools in the United States has decreased by 19% and the number of students served by those schools has decreased by 38%. Simultaneously, a growing body of research on Catholic schools indicates that these schools are extremely effective and are a gift to the church and the nation.

This dilemma of shrinking numbers of schools and established effectiveness indicates a need to refocus efforts, reinvigorate commit-

ment and revitalize leadership at the national and local levels. Thus the idea of a national forum was conceived.

These papers will be useful in fostering a national dialogue, aimed at clarifying the current status of Catholic schools in the United States, and developing a set of strategies for the future in order to strengthen and expand the network of Catholic schools throughout the country.

A number of regional meetings will be held throughout the country prior to the National Congress. These meetings will have a purpose similar to the Congress and be committed to the same three broad goals. They provide opportunities for large numbers of persons involved in and committed to Catholic education to read the theme papers, discuss the identified major issues, and develop written summaries of these discussions, using the study guides included in this series. These meetings will insure the broadest possible participation and strengthen the linkage between national strategies and local action on behalf of Catholic schools.

Delegates to the National Congress will be present at each of the regional meetings. NCEA staff and Congress Planning Committee members will be available to serve as resources and presenters. The results and recommendations from all regional meetings will be included as agenda for the National Congress.

This input from the regional meetings will allow the National Congress to be more representative of the total Catholic community. Consequently, the Congress will be more effective in representing the needs of Catholic schools and thus more able to develop effective and realistic strategies on their behalf. Regional meetings will be held after the Congress as an additional means of strengthening the linkage between national and local, strategy and action.

As Father Andrew Greeley has observed in his research and commentators are so fond of repeating, Catholic schools are most needed and most effective during times of crisis and stress. In the world of the 21st century—with its increasing population, dwindling of already scarce resources, and persistent growth in the gap between rich and poor - collaboration may not come easily. The present conflict in the Middle East being the most visible example. At the same time, rapid and largely unexpected changes in Eastern Europe remind us that the human spirit cannot be kept permanently imprisoned by those who deny the persistent presence and power of the Spirit. Catholic schools which are true to their mission can provide powerful and influential awareness, gentleness and collaboration. They can serve as models for schooling in the next millenium.

The six volumes in this series are:

Volume I: *An Overview*, containing summaries of all eleven papers.

Volume II: *The Catholic Identity of Catholic Schools*, with papers by James Heft, SM and Carleen Reck, SSND.

Volume III: *Leadership of and on Behalf of Catholic Schools*, with papers by Karen Ristau and Joseph Rogus.

Volume IV: *The Catholic School and Society*, with papers by Frederick Brigham, John Convey and Bishop John Cummins.

Volume V: *Catholic School Governance and Finance*, with papers by Rosemary Hocevar, OSU, and Lourdes Sheehan, RSM.

Volume VI: *Political Action, Public Policy and the Catholic School*, with papers by John Coons and Frank Monahan.

A number of acknowledgements must be made. Without the commitment, energy and flexibility of the authors of these papers, there would be no books. They were always willing to be of assistance. Ms Eileen Torpey, general editor of the series, brought an expertise and sense of humor to the process. Ms Tia Gray, NCEA staff, took the finished manuscripts and put them into an eminently readable design format.

Special acknowledgement must go to the Lilly Foundation, without whose funding this project would not have been possible. Catherine McNamee, CSJ, president of NCEA, who allowed the human and financial resources of NCEA to be utilized for this undertaking, expressed continuing interest in the Congress and provided personal encouragement to those working on the project. Michael Guerra, Robert Kealey and J. Stephen O'Brien, the executive directors of the three sponsoring NCEA departments who conceived the project, have continued to work tirelessly for the success of this planned intervention on behalf of Catholic schools. They would be the first to acknowledge that there are many more whose present leadership is an essential element in explaining the current success of Catholic schools and whose future leadership will shape the schools in the next century. A special note of thanks is due those who issued the call to bring us together. They are eloquent role models for any who wish to be a part of this unprecedented effort on behalf of Catholic schools.

Paul Seadler
Project Coordinator
National Congress on Catholic Schools for the 21st Century
January, 1991

CATHOLIC SCHOOL GOVERNANCE

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Introduction

> There is no phenomenon more paradoxical in Catholicism since the council than the Catholic schools. On the one hand, the evidence is overwhelming that the schools are remarkably successful both religiously and academically. On the other hand, the enrollment in the schools is diminishing and Catholic leadership does not appear to be committed to Catholic schools as it was before the Vatican Council (Greeley, 1985, p. 130).

This statement of Andrew Greeley, a Catholic research sociologist, gives some indication of the turmoil which exists today regarding support for Catholic schools. In spite of the numerous church statements pertaining to the sponsorship and support of Catholic schools and the extensive research which has been conducted, Catholic schools are continuing to close. The church documents of the last 25 years include: *The Declaration on Christian Education*, 1965; *Statement on Catholic Schools*, 1967; *To Teach as Jesus Did*, 1972; *Teach Them*, 1976; *The Catholic School*, 1977; *Lay Catholics in Schools: Witness to Faith*, 1982; *Religious Dimension of Education in a Catholic School*, 1988; *The California Bishops Pastoral, Our California Catholic Schools: A Legacy to be Nurtured*, 1989; *and The Ohio Bishops' Pastoral, Catholic Schools: Heritage and Legacy*, 1990. The research on Catholic schools includes studies by: Greeley and Rossi, 1966; Greeley, McCready, and McCourt, 1976; Coleman, Hoffer, and Kilgore, 1982; Greeley, 1983; Bryk, Holland, Lee, and Carriedo, 1984; Yeager, Benson, Guerra, and Manno, 1985; Benson and Guerra, 1985; Benson, Yeager, Wood, Guerra, and Manno, 1986; Guerra, 1987; and Coleman and Hoffer, 1987.

The decline in the number of Catholic schools occurs within the context of numerous other changes facing Catholic education. These

include the continued decline of the number of women and men religious serving in Catholic schools; the spiraling cost of Catholic education as greater numbers of lay people, both Catholic and those of other traditions, become involved in the teaching and administrative ministry of Catholic schools; the evidence of diminished support for the growth and maintenance of Catholic schools by the Catholic clergy and hierarchy (O'Brien, 1987); and the unlikely alleviation of the cost burden to parents for the education of their children in Catholic schools through the use of tuition tax credits, vouchers, or other government funding. Many Catholic schools have been consolidated, merged, and closed in the past 20 years as a result of some or all of these factors. This leads to an expressed concern that Catholic schools will be unable to continue or be maintained, let alone expand.

The purpose of this paper is to reflect on Catholic school governance in order to expand the dialogue on the future of Catholic schools. This will be accomplished by giving a brief overview of: (1) how the Catholic schools have been governed; (2) the relationships which have been established between the schools and the governing authority; and (3) how the schools have been resourced and financed. Future challenges then will be addressed by examining: (1) a future creative governance model which can support the mission of the Catholic schools; (2) the future relationships which can be developed for the Catholic school community and the governing authority; and (3) future possibilities for the resourcing and financing of Catholic schools.

> It is not that we have lost faith in our organizations; it is they don't look as we imagined they would look, and we must now return to finding out what they do look like, what they are doing, how they construct organizational sagas to accomplish the missions they wish to achieve. We need to know much more about how their leaders and participants see the world, how they construct images that produce creative and adaptive strategies (Lincoln, 1985, pp. 227-228).

Governance of Catholic Schools

Governance is the act, process, or power of controlling, influencing, guiding, or directing actions or behaviors. Applied to Catholic schools, governance can be explicated and understood in several ways. Governance is: (1) articulating, monitoring, and controlling the philosophy, mission, goals, and values of the sponsor and the school; (2) creating, approving, reviewing, directing, and recommending policies which are appropriate to the mission and philosophy of the sponsoring diocese, religious community, or parish; (3) ensuring the quality and continuity of the administration of the school; (4) initiating and monitoring quality education; and (5) continuing growth and development of human, material, and financial

resources of the school community (Burke, 1988). It is within this complex understanding of governance that Catholic schools exist and move toward their future.

Catholic School Research and Governance

The research on Catholic schools, which began in the middle 1970's when individual dioceses started conducting studies of their schools, gave impetus to the investigation of new governance structures. The National Catholic Educational Association (NCEA) joined this effort by conducting national research on Catholic high schools in 1983. The first of these studies, *The Catholic High School: A National Portrait*, utilizes a survey instrument to gather data from 910 Catholic high schools (Yaeger, Benson, Guerra, and Manno, 1985). The purpose of the study was "to create a national composite view of the resources, programs, facilities, personnel, and policies of Catholic high schools" (Yaeger, et al., 1985, p. 2). It also was hoped that the study would: (1) expand the knowledge of alternatives for planning and development; (2) increase the understanding of specific contexts, problems and needs of the schools; (3) provide a resource for the training of new administrators and teachers; (4) guide policy makers in developing national strategies for strengthening the schools; and (5) raise the consciousness and understanding of the Catholic school community, as well as the American public and public school educators.

The major findings pertaining to governance include the following: (1) Catholic schools have a common mission, which includes faith development, academic excellence, and a sense of community; (2) the mission of the Catholic schools combines a caring community with discipline; (3) administrators view teachers as deeply committed to faith development and these teachers regard their work as a genuine ministry of the church; (4) considerable control and authority are vested in school administrators such that their broad powers are similar to that of a public school superintendent; and (5) church authorities and the religious who administer the schools still retain much of the power.

A further study by Benson and Guerra (1985) of full-time teachers in 45 Catholic high schools found that there was a need to address governance issues of involving faculty in administrative decision making. To further re-examine this research, the Secondary Department of NCEA sponsored an invitational symposium (1987) of administrators, teachers, academics, and religious community leaders. Important governance issues that surfaced include: (1) the need for broad-based participation of the school community in sharing a school's understanding of itself; (2) the ambiguities about role relationships; (3) the need for a study of shifting power and authority; and (4) finances. Another important issue is the role of the laity

in the governance of Catholic schools (Guerra, 1987). While involvement of the laity was advocated by the documents of Vatican II, it has yet to become a full reality (Greeley, et al., 1976; Sheehan, 1981; The Sacred Congregation for Catholic Education, 1982; and Yaeger, et al., 1985).

Research done by individuals outside the Catholic community also gave impetus to the necessity for involving greater numbers of school community members in the life of the school. The research conducted by the noted sociologists Coleman and Hoffer (1987) describes the Catholic school as a community of overlapping relationships, which reinforce and assist parents in the education of their children. They found that the development of human and social capital in Catholic schools enable members of the school community to build relationships which encourage trust and sharing.

Since trust is a form of social capital, a group in which extensive trust and trustworthiness exist is better able to accomplish its goals than a group where these trust factors do not exist. Boards of trustees, advisory boards and committees, parents' clubs and activities, parent/teacher associations, school crisis ad hoc committees, and fundraising events all have been used in various ways by schools to involve parents and other community members to provide the sharing of human and social capital.

> Many administrators know that, by creating collective strength among parents, they create a force that can be a nuisance; less often do they recognize that this collective strength can be a resource that both eases their task of governing a school and benefits the children who attend (Coleman, 1985, p. 532).

Research by Boyer (1983), Goodlad (1983), and Sizer (1983), along with the research on effective schools, also provides impetus for the search for collaborative governance structure changes. The literature of participative management, human relations, and systems theory also bring credibility to the need for involvement of the school community members.

The Place of School Boards in Catholic School Governance

The administrative function of Catholic schools within the church has undergone a dramatic shift within the last 25 years.

> Since the twelfth century, the Roman Catholic Church has been a hierarchical organization which professes that all authority comes from God and that formal authority within the church is exercised by the pope and the bishops in a collegial and collaborative manner. Since Catholic schools in the United States have traditionally been an expression of the teaching mission of the church, they functioned within the authority

structure of the church until the early 1960's. Around Vatican II, some leading Catholic educators proposed a change in the relationship of parish and diocesan schools to the church by suggesting that boards of education related to them should be totally jurisdictional and, therefore, assume authority over the operation of Catholic schools (Sheehan, 1981, p. 119).

This suggestion prompted a renewed effort to examine the nature of Catholic school governance and to explore ways of moving into the future within the authority structure of the church in the United States.

Lourdes Sheehan, RSM, secretary for Education at the United States Catholic Conference and former executive director of the National Association of Boards of Education at NCEA, has written extensively on boards and their status in the church and in the Catholic schools. Her seminal research, *The Study of the Functions of School Boards in the Educational System of the Roman Catholic Church in the United States* (1981) delineates the parameters of board governance, according to Canon Law and explicates the rationale for boards in Catholic schools. Her latest publication, *Building Better Boards: A Handbook for Board Members in Catholic Education* (1990), provides administrators, pastors, bishops, board members, teachers, and parents with avenues to explore new governance structures within the Catholic schools.

Historical Changes in Governance—The Continuum of Governance Change

For the past 25 years, Catholic elementary and secondary schools have been moving along a continuum of governance change. The period of Catholic school board history following Vatican II until the mid 1980's, demonstrates a gradual move from the traditional governance structures of cooperation of school boards with the authority of the bishops and religious communities, to nontraditional or transitional governance structures of collaboration. Traditional/cooperative governance represents the authority structures in which established precedents determined policies and procedures and characterized the Catholic schools prior to and immediately following Vatican II. Transitional/collaborative governance refers to those structures, which have become operative in the past 25 years and which include the greater participation and involvement of persons in the Catholic school community.

Elementary schools, the majority of which were governed by the parish in the traditional/cooperative model of governance, are now beginning to experience new forms of governance. Regional schools, governed by consultative boards or boards with limited jurisdiction,

have been established to ensure the continuation of Catholic schools, particularly in the inner cities of many large dioceses.

The traditional models of religious community, parish, and diocesan- owned and operated high schools with advisory boards and committees also are moving from traditional/cooperative models of governance toward transitional/collaborative governance structures. The governance shift on the high school level is a definitive move from the traditional structures of religious community ownership to religious community sponsorship; from separate parish high schools to regional high schools; and from diocesan-owned and operated schools to schools with diocesan board governance structures. The movement from advisory to consultative boards and from diocesan and religious community boards to boards of limited jurisdiction, demonstrate this movement along the continuum of governance change in Catholic schools. Most major dioceses have experienced all or some of these governance changes.

As a result of some of these governance shifts during this period of transition, tensions arose that were, in part, a response to change. Those in power experienced a change in their influence. This was welcomed by some as a new possibility to share responsibility, and by others as a diminution of their lawful authority. The struggle appeared to be one of power sharing. In the past, the traditional/cooperative governance structures of the dioceses, religious communities, and parishes gave clear and definitive responsibilities to those in positions of authority and to the followers. The hierarchical authorities set the goals and directives and the laity and religious followed in obedience to lawful authority. Hierarchy and bureaucracy allowed for smooth functioning of the goals, roles, and functions of the diocese, the religious community, the parish, and the schools. This was the accepted mode of operation. The bishops, religious community superiors, and pastors had the final word. Thus, changes in the accepted manner of governance caused tension between the traditional autonomy of hierarchical authority and the more collaborative governance structures that were called for by Vatican II.

The Financing of Catholic Schools

Catholic schools have been resourced and financed in numerous ways by the Catholic community. These sources include: the payment of tuition; the contributions of parishioners for their parish school; the contributed salaries and services of women and men religious and lay teachers and administrators; diocesan, religious community, and parish services and subsidies; short- range fundraising; long-range development efforts; the contributions of Catholics, concerned citizens, and the business and corporate community to diocesan endowment campaigns; federal and state aid in the form of transportation, special educational services, textbooks, and other opportunities; and the volunteer services of a host of people whose

belief in Catholic education has both inspired and supported the efforts of the schools. Financial data has been gathered in recent years by the Elementary and Secondary Departments of NCEA. These data indicate that there is a need to look for further creative ways of financing Catholic schools.

A Future Governance Model

The NCEA studies, the research on Catholic schools, and the lived experience of the Catholic school community call for involvement, collegiality, collaboration, and partnership. The movement on the continuum of governance change should expand beyond the traditional/cooperative governance structures to the newer transitional/collaborative models of governance and beyond.

Future movement on the continuum of governance change is inevitable. The transitional/collaborative governance structures which have been implemented since Vatican II should continue to develop and expand. These new forms and directions will depend on the creativity, initiative, and power sharing within various dioceses and religious communities.

> Restructuring will call for bold, innovative thinking and cooperative planning by diocesan and parish leadership, diocesan departments of education, and local school administrators. Restructuring must be done in a way that ensures continued church presence, allows for involvement of those whom the schools serve, and responds to those whose jobs are affected (*Catholic Schools: Heritage and Legacy*, 1990, p. 6).

The following governance model is supported by a number of assumptions that are found in the research on Catholic and public schools, in the literature of education and business, and in the lived experience of Catholic school community members. These basic assumptions are:

1. Catholic schools are very successful both academically and religiously (Greeley and Rossi, 1966; Greeley, McCready, and McCourt, 1976; Coleman, Hoffer, and Kilgore, 1982; Greeley, 1983; Bryk, Holland, Lee, and Carriedo, 1984). They are more important for the church in a time of transition than in a time of relative stability (Greeley, et al., 1976).

2. Catholic schools offer an autonomous, holistic, educational alternative to government-controlled public schools. The success of Catholic schools is largely the result of a social grouping of overlapping relationships that form a community whose human and social capital is of enormous importance to contemporary American life (Coleman and Hoffer, 1987).

3. Trust is a form of social capital, which enables a group to better accomplish its goals (Coleman and Hoffer, 1987).

4. Power and authority should be shifted to the local site to increase ownership of the school and to assist the local school to be self directing, responsible, and accountable. The formation of site-

specific committees of administrators, teachers, parents, and students should identify new school policies and plans (Goodlad, 1983).

5. The maintenance and expansion of Catholic schools can be effected

when greater decision-making roles are given to the laity (Greeley, et al., 1976).

6. Power is neither created nor destroyed, it is only transformed or transferred (Siu, 1979).

7. The empowerment of people is the art of increasing the influence and power which people have over life's circumstances (Gross, 1985).

8. Colleagueship, as the organizing principal of Catholic schools, is needed to ensure that those who support the schools have a voice in its governance (Bryk, et al., 1984).

Transformational/Codeterminative Governance

A model that suggests a possible future governance structure for Catholic schools is the transformational/codeterminative governance structure paradigm. It offers a power-sharing approach to governance for the continuation, maintenance, and expansion of Catholic schools. It is based on the research on effective schools, the research on effective Catholic schools, the literature of participative management, power, and empowerment, and the lived experience of Catholic school community members. Transformation is the markedly different form that governance structures should take so that Catholic schools can continue to exist. Codetermination is the manner in which decisions are mutually agreed upon and implies an ownership on the part of each person involved in the decision making. It is more than mere cooperation and collaboration. Combining these concepts, the future of Catholic school governance structures becomes a search for the ownership of the enterprise of Catholic schools by all segments of the church and the local civic community.

The future offers the possibility that: (1) Catholic schools will be administered and staffed totally by the Catholic laity and persons of other religious traditions; (2) the school will be controlled by the local Catholic community through boards with local jurisdiction and accountability; (3) the processes used in the smooth operation of the school will be collegial, collaborative, and codeterminative; and (4) school community membership will be expanded to include an ever-increasing number of persons who have an interest in and concern for quality education. These possibilities already exist on the Catholic college and university levels, in some religious community-owned high schools, and in some consolidations of parish elementary schools.

This future model for Catholic school governance, the transformational/codeterminative governance structure paradigm, should take these future possibilities into account. The paradigm should include the balance between centralization and decentralization and the

concept of a "franchise."

Centralization and Decentralization

> A dynamic, ever-changing system of decentralization and centralization balances the benefits of local administrative autonomy with the pursuit of unified goals and blends local leadership with central leadership in a system that helps each level to understand its responsibilities, limitations, and prerogatives (Murphy, 1989, p. 809).

In this model, centralization in Catholic schools resides in: (1) the authority and power of the bishop or religious community, which is vested in the local school; (2) the charism, spirit, and traditions of the sponsoring entity; and (3) the policies which flow from the philosophy and mission of the sponsoring authority. Decentralization is evidenced in: (1) the kinds and types of administrative responsibilities that are delegated to and shared with individuals and groups in the school community; (2) the variety and number of individuals and groups which are considered part of the school community; (3) the variety of channels of communication which are implemented throughout the school community; (4) the types of activities developed to involve school community members; (5) the processes of decision making and problem solving which are employed; and (6) the climate that results from the interplay of the interactions and activities which are unique to each school.

Franchise

A "franchise" is defined as a privilege or right granted to a person or a group by a government, state, or sovereign. The "franchise" in this model is the mission of the church to teach. The "franchise" is requested of lawful church authorities by a group of persons who request the status of a juridic person to establish a private school with a Catholic focus. This group also could request or be requested to assume responsibility for already-existing parish, diocesan, or religious community-owned high schools. Existing elementary schools, which are presently under parish board control or high schools with consultative boards or boards with limited jurisdiction, whether traditional or transitional governance structures, could consider this type of franchise model.

The Role of Canon Law in a Franchise

Canon Law requires that the first criterion for the recognition of a Catholic school "franchise" is a relationship with and recognition by a diocesan bishop or other competent church authority (i.e., religious community). If a group wishes to establish a Catholic school, it would require this recognition. The second and third criteria are the approval by the competent church authority and the exercise of supervisory control over the teaching of religious doctrine. This approval requires the review of the school's statutes and the right

of the competent church authority to supervise the religious education of the "franchise." Accountability to the sponsoring entity, whether a diocese or a religious community, also is established through the implementation of the philosophy and mission of the sponsoring body and through responsible educational and financial stewardship. The purpose of the canons governing schools is the protection of those who participate in the "franchise" and guarantees a certain quality control (Morrisey, 1987).

Governance Structures of Franchised Schools

What are the characteristics of a "franchised" Catholic school, which has both centralized and decentralized structures? What constitutes its external and internal organization and structure? What is the nature of the relationships within the school community, and how is the school resourced and financed?

After Vatican II, there was a call by educators for boards of Catholic schools to be totally jurisdictional and to assume authority over the operation of Catholic schools (Sheehan, 1981). Since Canon Law requires that the criteria of recognition, approval, and review be present to obtain a Catholic school "franchise" (Morrisey, 1987), future boards of Catholic schools can acquire school-based management responsibilities through satisfying these criteria, by exercising responsible fiscal stewardship, and by implementing the philosophy and mission of the Catholic school. These "franchised" schools would effectively alleviate the burden on small parishes and parishes with limited personnel and finances. The board would involve the laity in power sharing at all levels.

Responsibilities of the Board

Under these conditions, the responsibility for the operation of a Catholic school would reside in the members of the board that obtained the "franchise." The board's essential responsibilities include, but are not limited to: (1) assuming the role of the juridic person; (2) understanding the spirit and charism of the school and its place in the church; (3) the election/appointment and evaluation of the school's chief administrator (president, principal); (4) supervising and monitoring the philosophy and mission of the school; (5) formulating policies which are consistent with the purposes of the school and which affect the entire school community; (6) development of strategic and tactical planning models; (7) monitoring the human, financial, and material resources; and (8) providing some of the human, financial, and material resources needed for the successful operation of the schools.

To implement these responsibilities, board members should possess a variety of leadership gifts. These gifts include the expertise, knowledge, and understanding of the essential responsibilities listed above. Board members who also possess human, material, and financial resources that can be made available for the school are vital.

Knowledge and recognition of these leadership gifts in members of the local school, church, and civic communities is mandatory for the identification and selection of board members. Without persons who possess these gifts, the "franchise" will not have the necessary resources to implement its mission and goals.

In addition to the responsibilities and gifts that are required of board members, the board should work in close harmony with the administration, faculty, staff, students, parents, and interested and concerned school community members to ensure the success of the school. This includes development of the processes of communication, team building, power sharing, and decision making, which are so closely associated with the content of board responsibilities. School community members can join the board in its operation of the school through membership on board committees, thus enabling them to become essential codeterminers of the enterprise.

Future Financing Possibilities for Catholic Schools

The traditional means of financing Catholic schools, reiterated earlier in this paper, will continue to provide some of the funds for the schools. However, in order to meet the escalating costs of an entire lay staff, further political means to ensure that justice is afforded to all children should be pursued. The financing of Catholic schools for the future will be one of the main responsibilities of future boards. Besides providing some human, financial, and materials resources of their own, board members should be involved in the political arena of choice and justice in education. They should be willing to use their political savvy and personal gifts to garner the necessary resources for the maintenance and expansion of the schools. The greater involvement of parents as taxpayers should be an agenda item for boards in Catholic schools and for the leaders of the church. Means should be found to empower parents to lobby for justice and choice in the education of their children. Church authorities should give voice to the concerns of parents. An example of this is the recent pastoral on education by the bishops of Ohio, in which they state:

> As we renew our efforts, we hope to inspire our fellow bishops across the United States to mobilize energies at the national level. Together, we must pursue constitutionally acceptable means to provide a just distribution of tax dollars so that all parents may exercise realistically their right of choice in the education of their children (*Catholic Schools: Heritage and Legacy*, 1990, p. 6).

It also is incumbent on the entire Catholic community to realize its responsibility for the future of Catholic schools. The transformational/codeterminative governance structure requires the entire Catholic community to assist those who desire a quality education

in a Catholic school, through the sharing of human, material, and financial resources.

> Development efforts on the diocesan, parish, and school levels are increasing. But the real key to financial stability lies in the generosity of the entire Catholic community. No longer are we a fragmented immigrant Church. Our people are in the mainstream of American society and the national economy. According to a recent Gallup poll, Catholics are the most prosperous of religious denominations. Yet, by the same poll, Catholics, as a group, give a significantly lower percentage of their income to the Church. Finances may not be the problem. A lack of conviction might be, and, if so, the Catholic community must find within itself the will to support the many ministries of our Church (*Catholic Schools: Heritage and Legacy*, 1990, p. 8).

Is it possible that the power sharing inherent in the transformational/codeterminative governance structure may be the conviction that challenges Catholics to take the responsibility for the Catholic schools of the future? Will church authorities share their legitimate power through franchising Catholic schools to the laity who share in this vital mission of the church? These questions, along with many others, continue the governance structures dialogue on the future of Catholic schools.

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GOVERNANCE

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Introduction

Although Catholic schools have existed in the United States since colonial times, the beginnings of what is known as the "Catholic school system" began in the 19th century. In order to understand and appreciate the current governance of Catholic schools, on which the future will be built, an historical perspective is helpful.

In their study *Effective Catholic Schools: An Exploration*, Bryk and Holland concluded that the two significant challenges facing Catholic schools are finances and governance. Although governance is the focus of this paper some references will be made to the financial challenges.

Historical Background

Traditionally, Catholic schools have been organized as parish diocesan or private. As such, each has its own governance structure.

Typically, most elementary and some secondary schools were opened by individual parishes which served as the focus of life and support for the new Catholic immigrants. In addition to his role as spiritual leader, the pastor was one of the few well educated people in the parish. Although there are a few instances of lay people staffing parish schools, most pastors depended on religious congregations of women and men to operate schools. In this climate "governance" was a non-issue. It was expected that the pastor would make all the decisions regarding the school, including financial. Parents paid little or no tuition and the religious faculty received a small stipend for their services.

Most diocesan secondary schools were founded when the individ-

ual parish was unable to support high school grades. Orginally the bishop assumed a very active decision-making role and appointed a diocesan priest as principal. Where boards existed they were composed primarily of local clergy who advised the bishop on financial matters. Even when diocesan school boards were called for by the Third Plenary Council of Baltimore (1884), their members were priests who assisted the bishop in the administration of Catholic schools.

These boards pre-dated the position of Catholic school superintendent. In 1888 the first diocese to appoint a superintendent of schools was New York. When the development and functional status of the diocesan superintendent of schools was studied by John M. Voelker in 1935, he concluded that most of the functions which had been legislated for diocesan boards or commissisions by the Third Plenary Council of Baltimore were being handled by the superintendent whose authority depended ultimately upon the will of the bishop (Sheehan, page 57).

Private Catholic schools, on the other hand, have a very different governance history. In addition to responding to the invitation of bishops to staff parish schools, many religious congregations, especially those with European roots, opened private academies. By charging tuition to their wealthier population, the congregation had the financial support which permitted them to teach for a stipend in the parish schools and opened schools for blacks and native Americans. The religious superior made decisions, including faculty assignments, and the academies' finances were handled by the treasurer of the religious congregations.

With few modifications, these descriptions would have been typical of Catholic school governance through the mid-1960's and Vatican Council II when the educational board movement, involving more than clergy, was born.

Current Situation

Responding to the spirit and intent of Vatican II, the superintendents department of the National Catholic Educational Association in 1967 began promoting lay involvement in the governance of Catholic schools. Continuing its commitment to this effort, NCEA established the National Association of Boards of Education in the early 1970's.

Recognizing that the existing clerical board model was not suitable, the superintendents adopted with few modifications a public school board model. With great enthusiasm dioceses and local Catholic educators attempted to form and foster Catholic boards of education using the NCEA proposed model. If success can be measured in numbers and committment of people involved, then many would report that the Catholic schools were well served by boards during 1965-1980.

However, shifts in demographics and changes in parishes and re-

ligious congregations as well as the 1983 Revision of Canon Law led some Catholic educators to the conclusion that a public school board model was not appropriate for Catholic school use. Studies of the authority structure of the Church and the history of the board movement encouraged the development of governance structures for schools consistent with how the Church functions. Changing demographics patterns forced many dioceses to consolidate some parish schools into regional or inter-parish ones. When more than one parish was involved with the school, the traditional governance model was no longer appropriate.

These new governance models are based on the important assumption that Catholic schools should be formally related to the Church.

The proponents of these new board structures intuitively reflected in their work what James Coleman reported from his later research. Coleman concluded that the effectiveness of Catholic schools is due in large measure to the presence of "social capital", that social support on which a student can draw in time of need. This social capital arises from the existence of "functional community", people held together by the Church and by common participation in religious activities and by explicit connection of the school with the community. Traditionally that functional community has been the parish, diocese, or religious congregation.

If Coleman's conclusions are accurate, then all governance models must provide structures which explicitly keep schools related to the Church.

Recognizing that Catholic elementary and secondary schools operate within the structures of both ecclesiastically and civil societies, the CACE/NABE Governance Task Force of NCEA recommended two types of boards: a board with limited jurisdiction and a consultative board. Both of these boards can function in parish, regional, diocesan and private schools and in accordance with various state statutes.

In its report the NCEA Task Force defined each type as follows:

> A board with limited jurisdiction has power limited to certain areas of educational concern. It has final but not total jurisdiction. For example, since the diocesan bishops has jurisdiction over the religious and catholicity of all schools including private schools, the Board of Trustees of a private school is a board with limited jurisdiction rather than total jurisdiction.
>
> A consultative board is one which cooperates in the policy making process by formulating and adapting but never in acting policy. This type of board is more in keeping with shared decision making in the Catholic church because of the consultative status of the diocesan presbyteral council and the diocesan council. The consituting authority states those areas where the board is to be consulted. Such action is usually made effective by the boards constitution. (*Primer* page 59)

Currently, approximately 70% of United States Catholic schools have some type of board or education committee involved formally

in governance.

Financially, Catholic schools are attempting to function between models. The majority of Catholic schools now charge tuition and are dependent on subsidy and third source funding to make up the difference between tuition and cost per pupil. However, unlike the proposed governance models, there are no financial models available to reflect the realities within which schools operate. There is agreement that some solutions must be found to keep schools available to all Catholics regardless of the families socio-economic status. Some dioceses and schools are engaged in serious development efforts. With 34 dioceses responding, NCEA reports that in 1989, more than $240,812,500 has been raised by diocesan development efforts specifically for Catholic schools. These efforts are based on a philosophy which supports the belief that the financing of Catholic schools is the responsibility of the total Catholic community and not solely that of the parents.

Future

Until the mid-1960's, Catholic school governance, including finances, was based on the ownership model. Parishes, dioceses and religious congregations were the owners and operators and therefore the recongnized authority figures, the pastor, bishop and elected congregational leaders, were the decision makers.

Influenced no doubt by the developments in the governance of health care and higher education institutions, some Catholic educators have suggested alternative governance models based on sponsorship, partnership or colleagueship. Some shift from the prior decision-making model is desirable; but there are fundamental questions which must be answered before settling on a "new" governance model.

For example, the question is not who owns the schools but rather what is the Church's understanding of decision making in the operation of schools? Recognizing the changing nature of parishes and religious congregations, how important is it to maintain or establish a formal relationship between the school and the institutional Church? Who will exercise the leadership needed to solve the serious financial pressures on Catholic elementary and secondary schools?

Financial Challenges

Bryk and Holland concluded their study on *Effective Catholic Schools* by stating that if these "schools are to survive in their present form and maintain their capacity," they must tackle these four issues:

- declining subsidies from the contributed services of religious personnel
- increasing physical plant cost to due a long history of deferred maintenance

- the need for substantial improvement in the very low faculty salaries
- the likely need to increase to increase expenditures in response to a nation-wide concern about improving the quality of schools (Bryk and Holland, page 83)

The three major sources of income for most Catholic schools are tuition, subsidy, development and fundraising. Generally subsidies from parishes, dioceses and religious congregations have not increased, so Catholic schools have become increasingly tuition dependent. Many dioceses and individual schools are actively engaged in development and fundraising activities, but few generate the 10 and 20% of their annual revenues, the percentage Catholic school finance specialist argue should be generated through development activities.

If Catholic schools continue to become increasingly more tuition dependent, they will cease to be available to the majority of Catholic parents, particularly those in urban areas.

Governance Strucures

The traditional governance structure of Catholic schools will work well when the school is seen as an integral part of the moral/juridic person known as the parish, diocese or religious congregation. In these cases the schools can continue to florish within the civil and canonical regulations which pertain.

Where this traditional relationship no longer exists or in the cases of the opening of new schools, the following alternative governance structures are suggested. Whether or not a school is separately incorporated depends on the laws of the individual states regarding not-for-profits and the practices of the individual dioceses. In some cases, separate incorporation may be preferable but is not necessary for the following recommendations to be adopted.

1. That all non-parish schools which are not owned or sponsored by religious congregations be formally erected by the bishops as moral persons in their own names.

A number of institutions within the Church are recognized as moral persons. In addition to the diocese and each parish, Catholic hospitals and orphanages are frequently erected or recognized as moral persons. Within the Church, a moral person enjoys certain rights and privileges and has responsibilities to the bishop. If Catholic schools were to function as moral persons, they would operate within the diocese in the same way as parishes. The bishop would appoint an administrator to be responsible to him for the proper administration of the goods and services of the school. Moral persons are established by formal erection or recognizition by the bishop. (The dioceses of Nashville and Lansing have established some of their non-parish schools as moral persons.) According to this model the principal would become the canonical administrator of the school, appointed by and accountable to the bishop. Responsibilty of the school board would be determined by diocesan policies regarding all consultative bodies within the diocese.

2. That each diocese establish a diocesan school board as well as a local board for each elementary and secondary school.

If the bishop chooses to chair his diocesan board, the board could be constituted as one with limited jurisdiction. The areas in which the board would not have jurisdiction are those regarding the schools catholicity and religious education, since these aspects of the school are related to the canonical authority of the bishop which he cannot delegate. However, if the bishop does not assume an active role on the diocesan school board, the more likely case, then the diocesan school board should be constituted as consultative to the bishop.

In this instance it is essential that the bishop detail for the school board the areas in which he wants diocesan policies formulated and those which he wants to reserve to the local school level. The consultative diocesan school board cannot and should not function without this clear direction from the bishop. It is important to remember that the distinction between diocesan and local school authority is within the provisions of canon law which gives each moral person clear rights and responsibilities within the Church.

Therefore, the bishop should charge the diocesan school board with the responsiblity to formulate policies in the following areas:

1. The establishment of a formula for the local funding of schools. This formula should include percentage relationships for the annual operating budgets of schools between and among tuition, parish financial support and third source funding.

2. Standards and means by which Catholic elementary and secondary schools would be evaluated and accredited. This responsiblity would include the qualifications of teachers especially those who teach religion as well as specific requirements regarding the religious education curriculum.

Even with this clear mandate, the diocesan school board will immediately face the issue of who has responsibility for school property and how to factor this responsibility into the funding formula. As canonically established moral persons, non-parish schools assume administrative responsibility for their own property. In the schools that are parochial, the parish is responsible for the administration of all parish property including the buildings owned by the schools. In schools owned and are sponsored by religious congregations, the community determines the ownership and maintenance of property.

According to Church law parishes and religious congregations according to Church law, are relatively autonomous regarding the administration of their goods and services. The non-parish schools should be accorded this same status. Within this structure where the administrator of the school is responsible to the bishop local school boards should be constituted as consultative to the school administrator and responsible to assist the administrator in the following areas: planning; policy formulation; finances; selection of the principal; development including public relations and marketing; and evaluations of plans and programs.

Conclusion

The parish and religious congregations which founded and sustained Catholic schools no longer exist. Therefore, many of the current governance structures and most financial models no longer work.

The "Statement in Support of Catholic Elementary and Secondary Schools", which was enthusiastically endorsed by the bishops in November 1990, proposes four goals and some specific immediate actions which if implemented will address the governance and financial challenges schools face.

Catholic school leaders are responsible for local and diocesan initiatives which will insure that the following goals are met by 1997:

1. That Catholic schools will continue to provide high quality education for all their students in a context infused with gospel values.
2. Serious efforts will be made to ensure that Catholic schools are available for Catholic parents who wish to send their children to them.
3. New initiatives will be launched to secure sufficient financial assistance from both private and public sectors for Catholic parents to exercise their right.
4. That the salaries and benefits of Catholic school teachers and administrators will reflect our teaching as expressed in *Economic Justice for All.*

Immediately, leaders should assist parents to organize at diocesan and state levels so that there will be an active network in place when legislative action is needed regarding ensuring parental rights in educational matters.

Diocesan leaders, especially, can encourage development efforts for each school and diocese.

A task force similar to the CACE/NABE Governance one should be formed to develop appropriate models for financing Catholic schools. Catholic educators know what needs to be done in the area of governance and finances.

The recommendations and suggestions in this paper are offered to stimulate discussion and to test whether leaders have the will to do what needs to be done to insure that Catholic schools will remain a vital aspect of the Church's mission.

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STUDY AND DISCUSSION GUIDE

CATHOLIC SCHOOL GOVERNANCE AND FINANCE

I. Background Papers

Catholic School Governance:
Sr. Rosemary Hocevar, OSU, Ph.D., Vice President for Institutional Development, Ursuline College, Pepper Pike, OH.

Governance:
Sr. Lourdes Sheehan, RSM, Ed.D., Secretary for Education, United States Catholic Conference, Washington, DC.

II. Some Basic Questions

What models/structures are/will best support the mission of Catholic schools?

What is/will be the nature of relationships between the parish and the school? Between pastors and principals?

How do/will Catholic school leaders respond to the tension between collaboration and autonomy?

How are/will Catholic schools be financed?

III. Discussion

1. To what extent do the Background Papers address the basic questions?

2. What questions are not addressed by the papers?

3. What new questions are raised by the authors of the Background Papers?

4. What is the group's reaction/evaluation of the current status of this issue? Do not confine your analysis to the materials in the Background Papers.

5. What is the group's judgment about desirable directions for Catho-

lic schools in regard to this issue, and appropriate strategies for moving in those directions?

IV. Summary

2. *Strategy for the future* (A summation of responses to question 5: appropriate future directions.)

Discussion Leader_____Location_____Date_____

Rosemary Hocevar, an Ursuline Sister, has experience as a teacher, assistant principal, principal, diocesan administrator and university professor. She is the Vice-President for Institutional Advancement and director of the Graduate Program in Educational Administration at Ursuline College in Pepper Pike, Ohio.

She received her Ph.D. in educational administration from Kent State University, Kent, Ohio, and holds an MS in Chemistry from the University of Notre Dame, Indiana.

Sister Hocevar has served on the Board of Trustees at Ursuline College and as a member of the John Carroll University Teacher education advisory board. She has served on the executive committee of the Secondary department of the National Catholic Educational Association (NCEA). She is a member of a number of professional associations.

She has given presentations on a variety of topics in educational administration at national, state and local conventions and has done consultation work with the arch\dioceses of Cleveland, Youngstown, Ohio, Toledo, Ohio, Washington, DC and with individual schools in Illinois, Maryland, California and Ohio.

Lourdes Sheehan is a Sister of Mercy, Baltimore Province. She is a native of Savannah, Georgia where she received her early education in Catholic schools.

She earned her Ed.D. in educational administration from the Virginia Polytechnic Institute, Blacksburg, Virginia. Her M.A. is in Colonial History from the University of Pennsylvania.

Sister Sheehan has served as secondary school teacher and principal in Georgia and Alabama; as superintendent of schools and director of Christian formation for the diocese of Richmond, VA; as a member of the Provincial Council and as Provincial administrator for her religious congregation. For four years she served on the staff of the National Catholic Educational Association (NCEA) as Executive Director of the National Association of Boards of Education. Currently she is Secretary for Education at the United States Catholic Conference, the public policy arm of the United States Catholic Bishops.

She has participated in a number of diocesan and school in-service events, has spoken at the annual conventions of NCEA, and has published articles on Catholic education. Her special interests are preparing leaders for total Catholic education, leadership, boards of education, and the uniqueness of Catholic schools. NCEA recently published her work *Building Better Boards* a manual for education board members.

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